



2018 Tax Questionnaire

Please return this questionnaire with your tax data or bring it to your appointment.

Name(s) _____ Address _____

City _____ State _____ ZIP _____

Cell Phone () _____ Home Phone () _____ Email _____

() _____ () _____ Email _____

In an effort to ensure you pay the lowest possible taxes, please take a few minutes to complete this questionnaire. The answers to these questions will help us ensure that you receive all possible deductions and credits that you are eligible for.

Yes No

Did you direct deposit your refund last year? If your bank account has changed please provide a voided check.

Would you like to direct deposit your tax refund? Please provide a voided check.

Yes No PERSONAL INFORMATION

Did your marital status change during the year?

If yes, did you change your name with the Social Security Administration?

Did your address change from last year? If so, please fill out the address section above.

Can you be claimed as a dependent by another taxpayer?

Yes No DEPENDENT INFORMATION

Were there any changes in dependents from the prior year?

Did you pay for childcare while you worked or looked for work?

Did you pay for childcare expenses through your employer's flexible spending plan?

Did you provide over half the support for a parent or non-relative?

Yes No PURCHASES, SALES, AND INHERITANCE

Did you purchase or sell any real estate, partnership, or corporation interest this year?

Did you dispose of any stock during the year (other than stock held in your retirement account)?

Did you inherit property in 2018?

Did you purchase a vehicle in 2018?

Yes No ITEMIZED WRITTEN INFORMATION

Do you have written evidence to substantiate charitable contributions?

Did you make any non-cash charitable contributions (clothes, vehicle, etc.)?

Did you make any major purchases during the year (car, boat, etc.)?

Yes No MISCELLANEOUS INFORMATION

Did you have qualifying healthcare for you, your spouse, and your dependents for every month in 2018?

Did you make any out-of-state purchase for which the seller did not collect state sales or use tax?

Did you have any educational expenses during the year?

Did you make any contributions to an education savings or 529 Plan account?

Did you participate in a Health Savings Account (HSA) or Archer MSA?

Did you make energy efficient improvements to your main home this year (solar energy systems, geothermal heat pumps, wind turbines, or fuel cells)?

Do you have any foreign bank accounts?

Your Signature _____ Date _____